



Anchor Rolls Out New Proposal Automations to Help Accounting Firms Close Clients Faster

Conditional Discounts, Auto Expiring promos. and API based CRM drafts join Auto Price Increase, automating proposals and accelerating approvals and cash flow.

NEW YORK, NY, UNITED STATES, July 29, 2025 /EINPresswire.com/ -- Anchor, the free-to-use [autonomous billing and collection platform](#) trusted by thousands of accounting firms and professional service businesses today, introduces three new features that shorten the journey from quote to payments.

1. Conditional Discounts reward decisive clients who sign within a defined window, allowing firms to finalize agreements and receive payment sooner.
2. Auto Expiring Promotions let firms offer time-limited incentives that automatically revert to the regular rate when the term ends, protecting long-term margins.
3. CRM Proposal Integration turns opportunities from leading systems like HubSpot into ready-to-send proposals through Anchor's public API, eliminating copy-and-paste work and reducing errors.

"A good-looking proposal grabs attention, but to truly drive conversion, firms need extra capabilities," said Rom Lakritz, Co-founder and CEO at Anchor. "Conditional and Auto Expiring Discounts sharpen that experience with clear decision points, while CRM integration removes friction. Firms win work faster, and clients feel confident about acting quickly."

"Our customers first asked for proposal expirations, but as we dug deeper with the accounting community, we discovered the real goal: closing deals," added Tal Ben Bassat, COO at Anchor. "That insight led us to add to the proposal platform, an industry first automated negotiation capabilities, so firms can move every prospect from 'interested' to 'invoice sent' with zero extra clicks."

The new features are live for all Anchor customers today, joining the Auto Price Increase and hundreds of other features. Anchor remains free to use, with no subscription or credit card fees, and the same flat \$5 fee per transaction Anchor has maintained for the past four years.

Impact on accounting and professional service firms

Internal tests suggest the new capabilities trim average turnaround time , turning faster client

responses into earlier revenue. Time-bound incentives encourage clients to engage promptly, accelerating revenue and minimizing ghosting. Auto-Expiring Promotions ensure limited offers never stretch beyond their intended term, and CRM-generated drafts keep pipelines flowing without added work. All timing and pricing rules run in the background, giving every proposal consistent and effortless compliance.

A timely boost for tax season 2026 and beyond

Nick Boscia, Partner at Boscia & Boscia PC and [an Anchor design partner](#), raised his 2025 tax-package rates but paired them with time-limited discounts of 10-25% to reward early commitment. Starting 15 November, the firm sent roughly 1,800 bundled proposals through Anchor. Clients who acted during the first incentive window secured the deepest discount on the new 2025 rate. Those signing in the second window received a smaller reduction, while anyone completing their agreement after the final deadline paid the full updated fee. As a result, the firm collected 80-90% of its entire tax-season revenue upfront and, by late February, had already surpassed its total 2023 collections, long before most returns were filed.

Conditional Discounts and Auto-Expiring Promotions now productize that playbook, giving every firm the chance to enter tax season 2026 with smoother cash flow, predictable workloads, and far less stress.

About Anchor

Anchor is reinventing financial workflows for accounting and professional service businesses by simplifying proposals, agreements, invoicing, and payments. By replacing rigid document-based workflows with interactive agreements, Anchor helps firms eliminate revenue loss, improve cash flow, and grow profits. Trusted by thousands of firms, Anchor collects its five-dollar flat fee only when customers are paid. [Learn more at www.sayanchor.com](http://www.sayanchor.com).

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